# Discovery Meeting Checklist

To help us get the most from our first meeting, please take a few moments to think about the following:

## What are your main financial goals or priorities?

- ☐ Retirement
- ☐ Education
- ☐ Buying a home
- ☐ Paying down debt
- ☐ Cash flow management
- ☐ Insurance
- ☐ Estate planning
- ☐ Investment planning – allocation, feedback, etc.
- ☐ Investment management – looking to outsource
- ☐ Other:

Do you feel you are on track to reach these goals?

What financial strategies are you currently using to reach these goals?

## What is your risk tolerance in terms of your investments?

- ☐ Aggressive
- ☐ Moderate/aggressive
- ☐ Moderate
- ☐ Conservative/moderate
- ☐ Conservative

## Documents to have available for reference and to send following the meeting:

- ☐ Recent paystub(s)
- ☐ Most recent tax return
- ☐ Detailed breakdown of all investment accounts (401Ks, 403Bs, IRAs, brokerage/taxable) showing:
  - ☐ Each individual holding you have, by account
  - ☐ Number of shares/ dollar value in each
- ☐ Cash/bank balances
- ☐ Estimate of monthly/ annual expenses
- ☐ Details on any outstanding debts (mortgages, car loans, student loans, credit cards, personal loans):
  - ☐ Balance(s)
  - ☐ Interest rate(s)
  - ☐ Minimum monthly payment(s)
  - ☐ Monthly payment(s) you are actually making (if different)
- ☐ Summary of insurance policies (life, disability, long-term care):
  - ☐ Benefit amount
  - ☐ Premium
  - ☐ Type of insurance
- ☐ Outline of beneficiaries listed on any insurance or retirement accounts
- ☐ Any other financial documents you think might be pertinent to our conversation

GEETA BRANA WEALTH
FINANCIAL SERVICES FOR WOMEN

GBrana@fcmadvisor.com |732-546-9315 |www.GeetaBrana.com
960 Holmdel Rd, Building 1, Holmdel NJ 07733